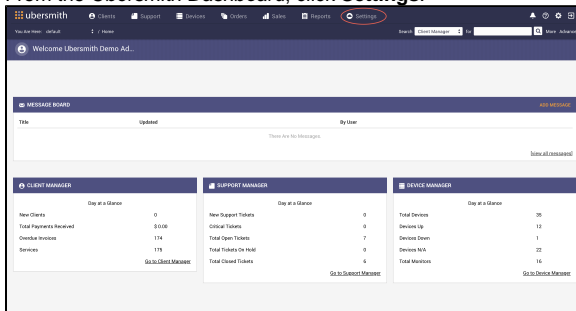


Adding Coupons

You can configure a discount code to offer a service at a lower rate for a specified date range. This feature works as a limited-time sale on your services. Coupons can be added to an order by setting the info[coupon] API field to a valid coupon code. The configured discount will then be applied to the service(s) in the order.

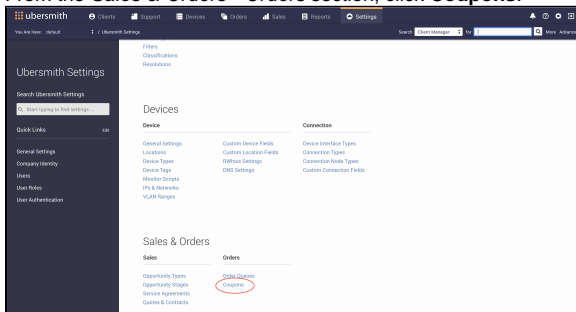
Access the Coupons Page

1. From the **Ubersmith Dashboard**, click **Settings**.



The **Ubersmith Settings** page appears.

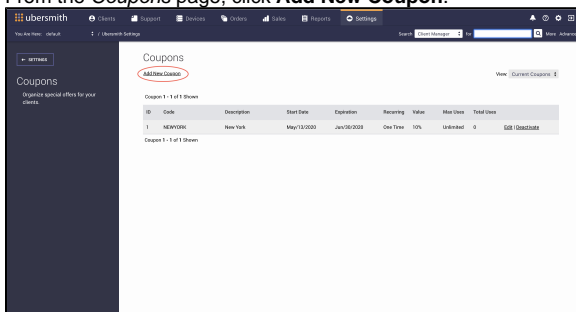
2. From the **Sales & Orders - Orders** section, click **Coupons**.



The **Coupons** page appears.

Complete the Add Coupon Page

- From the **Coupons** page, click **Add New Coupon**.



The **Add Coupon** page appears.

Complete the Coupon Details Tab

1. In the **Description** field, enter a description for the coupon.
2. In the **Coupon Code** field, enter an alphanumeric discount code or click Auto Generate to have one automatically generated. Codes are automatically formatted to be all capital letters.
3. In the **Service Plan** field, select the service this discount is for.
4. In the **Start Date** field, enter the date the sale starts.
5. In the **Expiration Date** field, enter the date the sales ends.
6. In the **Discount** field, enter the dollar amount, then select the \$ symbol, or enter the percent amount then select the % symbol for the service.
7. In the **Type** field, either select recurring or one-time. A one-time coupon offers a discount for a single billing period and a recurring coupon effectively discounts the cost of a service.
8. In the **Setup Discount** field, enter the dollar amount, then select the \$ symbol, or enter the percent amount then select the % symbol any service startup fees.
9. In the **Max Uses** field, enter the number of times the discount can be used, or select **unlimited**.

On this page:

On this page:

- [Access the Coupons Page](#)
- [Complete the Add Coupon Page](#)
- [Complete the Coupon Details Tab](#)
- [Complete the Upgrades Tab](#)
- [Related Topics](#)

10. In the **VIP Code** field, select **Yes** if you want only existing clients to be able to use the discount.

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Add Coupon

Coupon Details Upgrades

English(USA) Description: 20PERCENT

Français

canadien Description:

Português

(Portugal) Description:

Coupon Code: 20PERCENT [Auto Generate]

Service Plan: Professional Services

Start Date: Jun/03/2020

Expiration Date: Jun/30/2020

Discount: 20 %

Type: ☐ Recurring ☒ One time

Setup Discount: 0 %

Max Uses: ☒ Unlimited

VIP Code: ☐ Yes ☒ No

Save Save & New Cancel

Complete the Upgrades Tab

If there are any upgrades for the service you are offering a discount on, configure those prices on the *Upgrades* tab.

1. After configuring the *Coupon Details* tab, click the *Upgrades* tab.
2. In the **Discount** field for the upgrade, enter the dollar amount, then select the \$ symbol, or enter the percent amount then select the % symbol for the service
3. In the **Setup Discount** field, enter the dollar amount, then select the \$ symbol, or enter the percent amount then select the % symbol any service startup fees.

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Add Coupon

Coupon Details **Upgrades**

Upgrade	Discount	Setup Amount
Professional Services		
Project Management:		
Basic Project	20.00 %	0.00 \$
Full Project Management	20.00 %	0.00 \$

Save Save & New Cancel

Related Topics

[Managing Coupons](#)